



SRA INTERNATIONAL
ANNUAL MEETING
SEATTLE 2023
OCTOBER 14-18

A Roadmap for eRA System Implementations from PUI to Tier 1 Institutions

- **Matthew Kingore** | CRA, Senior Solutions Consultant | Cayuse
- **Jennifer Hanlon Patterson** | Director, Research and Sponsored Programs
| Stephen F. Austin State University
- **Beverly Kemp** | eRA - Research Coordinator of Research and Sponsored
Programs | Lamar University

Lamar University Profile



9+ million in funding FY22

85 proposal awards FY22

Best college in Texas for salary potential

Most affordable degree programs

- Carnegie Doctoral Research University
- One of the fastest growing Texas colleges and universities
- 500 faculty members
- 17,000+ students
- Uses Cayuse SP, Proposals, Human Ethics and Fund Manager

Stephen F. Austin State University Profile

STEPHEN F. AUSTIN STATE UNIVERSITY



- Carnegie Doctoral Research University
- Newest member, University of Texas System
- Fall 2022 enrollment 10,888
- Full-time faculty 531
- Fall 2022 launched Cayuse SP and Proposals
- Spring 2023 will launch Cayuse Fund Manager

FY23 Proposal and Award Data

- **77 external proposals submitted**
- **44 new awards - \$8,222,262**
- **108 Active awards - \$29,319,880**
- **Internal grant program**
 - **Annual budget \$209,343**
 - **FY23 applications - 170**
 - **FY23 awards - 134**

Today's Audience:

Are you

- Considering an eRA system?
- Preparing to implement an eRA system?
- Comfortable with current system but curious?

Reasons to select an eRA system

- Current system burdensome for staff
- Inefficiencies in current process
- Outdated processes
- Paperwork burden
 - Tracking down missing items
 - Forms frequently changed
 - Use of retired forms

Lack of accessibility and transparency

- Tracking
 - Where is my proposal?
 - Who needs to approve next?
- Coordination with Co-PIs
 - What do you need from me?
 - I'm a co-PI?
- Coordination with sponsored programs
 - What documents do you still need?
 - What's the current fringe rate?

Implementation Process



- Discovery
 - 2-10 weeks
- Configuration
 - 2-14 weeks
- Delivery
 - 1 week
- Roll-out
 - 1 week

Gather implementation team



- IT / Project Management Office
- Sponsored Programs Staff
- Administrators
- Faculty/staff for beta testing
 - faculty with frequent grants
 - administrative staff who help prepare grants
 - other staff

Discovery Phase

- Gather input
 - Review/deep-dive into current business processes
 - likes and dislikes of current system and processes
 - consult stakeholders
 - consult other institutions
- Identify data conversion requirements
- Document anticipated process change
- Map needed integrations



• Configuration

- Configure solution based on requirements
- develop integrations
- develop data conversions
- test configured instance

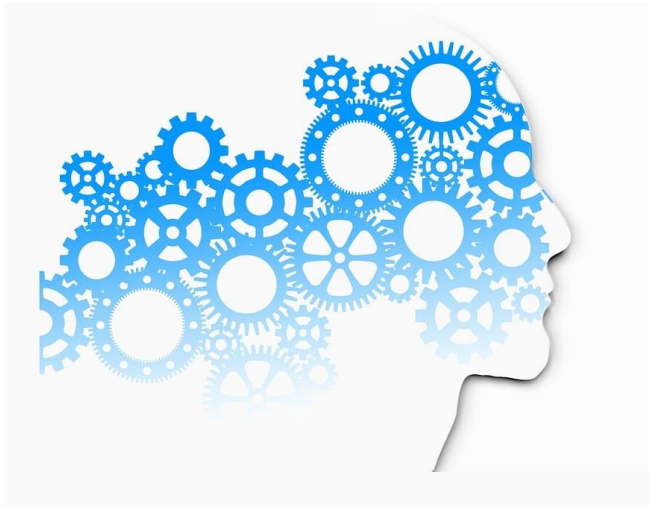
• Delivery

- final data load
- superuser training
- production version of configured solution

Roll-out

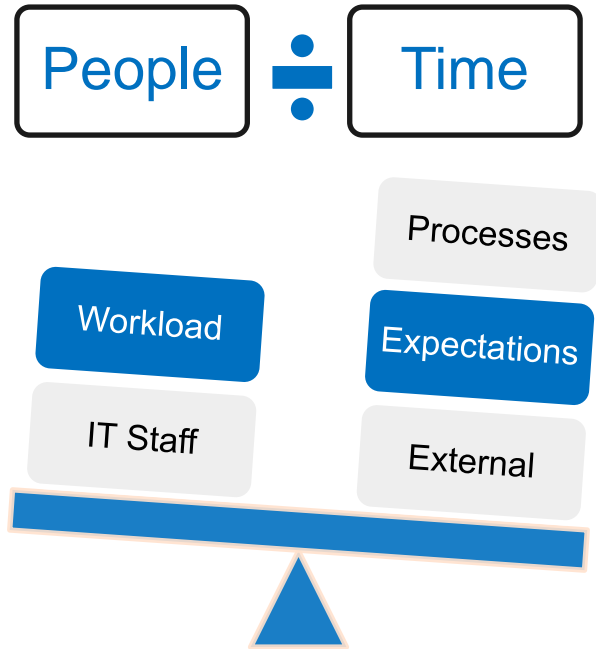
- Communicate early and often
 - before selecting the eRA system
 - during build
- Consider university calendar
- Teaser announcements
- Implementation Team - add teaser to signature line
- Prepare training materials
 - less is more
 - include images from eRA system
 - consider users
- Schedule training
- Develop an FAQ or knowledge base
- Determine how to communicate updates

Considerations



- Planning for challenges
- Expecting the unexpected
- Overcoming stumbling blocks
- Maintaining balance

Planning for challenges



Expecting the unexpected

- Uncooperative data
- Staffing changes
- Testing gone wrong
- Timeline interruptions



Overcoming stumbling blocks

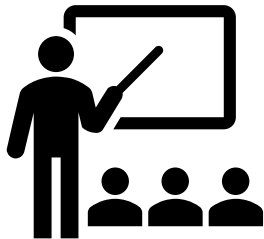


- Take a consultative approach
- Realistic goal-setting
- Stakeholder engagement
- Regular touch-points

Maintaining balance

- **Use technology**
 - Provider tools such as Cayuse Basecamp
 - Institution level use Teams or other shared workspace
 - Extensive note taking
 - To-Do list and team assignments
- **Develop consistent meeting schedule**
 - Prepare staff to commit time
 - Keep calendars updated
 - Keep key stakeholders informed without attending all meetings

Lessons learned



- Confer with institutions of similar output and sponsor types
- Rely on expertise of eRA provider
- Prepare to be busy
- Final product is flexible
- Remember the end-users